

The

MERRITT POINT MINUTE

GUIDING CLIENTS THROUGH THE COMPLEXITIES OF WEALTH MANAGEMENT



July, 2025

Willow Bend Wealth Management Welcome



Jason Hoofnagle
CFP®, Managing Partner



Peggy Etheridge
CFP®, Managing Partner



Chris Offner
AAMS®, Managing Partner



Melinda LaPert
Registered Operations Manager



Suzanne Berk
Senior Client Associate

We are thrilled to announce the addition of the Willow Bend Wealth Management group to Merritt Point Wealth Advisors. The Willow Bend Wealth Management team joins us from Plano, Texas and brings with them several decades of combined wealth management experience. As Merritt Point continues to expand nationally, we could not be more excited to welcome Willow Bend and for the resources and insights they will help bring to our practice.

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250 Park Avenue New York, NY 10177

Economic Commentary

2025 continues to be marked by twists and turns. Over the past quarter, as post-Liberation Day earnings have begun rolling out, we've seen equity markets return to near all-time highs as positive employment and inflation readings, along with tariff negotiation have subdued some of the economic concern. Many economists on the street now expect we may only see one rate reduction from the Fed this calendar year. As we keep a watchful eye on Powell and his team of Fed Governors, we continue to focus on owning high-quality investments for clients in both the equity and fixed income space. Additionally, we have broadened our recommendations geographically, with increased exposure to developed international markets- primarily in Europe, with some in Asia, as well as non-traditional alternative investments that reduce the correlation in portfolios to equity and bond markets. We remain cautiously optimistic for the S&P this year as we continue to see the result of tariff policy and geopolitical events play out.



Ross Bauer
Founder, COO

Merritt Point Summer Gathering

In early June some of the Merritt Point Wealth Advisors team gathered in the golf simulator for some fun and friendly competition! This get-together gave us an opportunity not only to spend some time as a group, but to reflect on how we can all work together to achieve desired outcomes.. on the golf course and more importantly for our clients!



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2025 FINET Northeast Connect Meeting

TEAM BIRTHDAYS



Ted Youngling
Executive Vice President -
Investments
July 11th



Ross Bauer
Founder, COO
July 12th



Jason Andrews, CRPC®
Founder, CEO
July 24th



Rob Schaefer, CFP®
Senior Wealth Planning Strategist
August 25th



Larry Baker
Senior Vice President
September 29th



Ross Bauer, COO had the pleasure of representing Merritt Point Wealth Advisors at the 2025 Wells Fargo Advisors Financial Network Northeast Connect Meeting where he shared insights on the independent wealth management space and how we arm our advisors with the tools and support they seek to help deliver excellent client experiences.

UPCOMING NYSE HOLIDAYS

*Please be advised that our
offices will be closed in observance
of the following market holidays:

Labor Day
Monday, September 1st

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Awards and Recognition: Women in Leadership



Beth Cutler, President and Founder, Merritt Point Wealth Advisors, speaks on “Women In Leadership” at the Women In Independent Wealth Summit in Willamette Valley, Oregon.

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A MESSAGE FROM OUR CEO



Jason Andrews, CRPC®
Founder, CEO

Dear Clients,

As the Merritt Point team continues to grow—alongside our valued client base—I want to take a moment to wish everyone a safe, enjoyable, and well-deserved summer season.

Summer is a great time to relax and reconnect with friends and family, but it’s also the perfect opportunity to begin planning for year-end financial strategies. Whether it’s tax-loss harvesting, charitable giving, gifting strategies, or required minimum distributions, thoughtful preparation now can set you up for a strong finish to the year.

As always, we’re here to support you every step of the way.

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